

[Note: This is a transcript created from a live relay service provided on June 21, 2018, for Hands-On Section 508 Workshop presented by Jennifer Fagan-Fry. There may be errors in the transcription. If you have difficulty accessing information for this program, particularly if using assistive technology including screen readers, eye tracking devices, or voice recognition software, please email us at library.reference@noaa.gov with the following information: URL (web address) of the material you tried to access, the problem you experienced and your contact information. We'll get back to you as soon as we can, and attempt to provide the information you're seeking].

[Please stand by for realtime captions.]

>> Good afternoon everyone, this is Jennifer Fagan-Fry, I will give it a few more minutes. I see a lot of people are jumping on the call right now, I will pause for a few minutes, and to allow more people join in and then we will begin in the next few minutes.

>> Hello everyone this is Jenn, I'm going to get started, I see people are joining in so I will do housekeeping first and then we will get into everything, I want to remind everyone we are recording the session. It will be available on the library website, and I will put it up on the Section 508 guide and subject guide that we have available. We have a section 508 brown bag seminar tab, if you go to the tab all of the previous seminars are available, any accompanying available materials, there will be a transcript, recording, material that will be posted with it.

>> This is a webinar only, so I will not be able to take live questions however, I am certain people will have questions, please enter them into the question panel, Katie Rowley our outreach, will monitor that in the chat. If you put the questions we will record the questions and I can get back to you in the next couple of days for the response. I know a few people did send in some questions ahead of time which I think I will be covering, as I do the demonstration. And also I will make sure to go back and make sure I hit all the points as well. So again, if you have a question please enter it into the question panel, I will try at the end to take a look at their and grab -- there and grab a handful of questions. This session will be longer than the last one, the last one we did 30 minutes, I have set aside one hour today, hopefully my voice will hold out for one hour. We will see. With that I will jump right in.

>> What we will do today, I will go through and create a word document with specific elements of things that are common to most NOAA publications. At least the publications that we see and handle with submissions for the depository. I will insert images, a table or two, I will show a handful of table things, not everything to make it compliance but things that would be helpful to begin working on. I will also insert an equation, footnotes, the basic that go into a document. I have also created at the request of a number of you, I've also created a very generic and basic

template for technical memorandums. It is not necessarily intended for everyone to use all the time, it is not necessarily a perfect document, but what I wanted to do was create something that everyone can use as a guide. So that will be posted with the recording, and the transcript for this session. You are free to use it, as you would like.

>> If you have any feedback on it, I am open to feedback. I have talked to a couple of our partners, people who submit frequently, the science center has been kind enough to provide me with their template that they use for their tech memos. They have been gracious enough to allow me to post that as well. Their template is also five away compliant. So, with all of that, I will go ahead and get started. If there are any problems, if there are any connection issues please put that in the chat box. I will try to monitor that as best as I can.

>> We will get started, have a blank document here, when we are creating documents, that are going to eventually be accessible, it is important to utilize the tools that Microsoft office has included. These are what helps translate a lot of the elements and tags into the PDF. Instead of creating a section heading, using the tools up here in the font section, it is best to go right over the styles and start with headings. I will begin with heading one, this will be my abstract for executive summary. Whatever it may be in your document.

>> When you select a heading, this one is that a certain font size, Cambria 14, it is blue, if you do not want it you can modify the heading if you right-click on the heading there's an option for modifying, you can set the font size, the color, the style, everything. At the bottom there are options for a quick style list, automatic update, you can create a template of all of these headings and their settings if you would like to do so. All of those options are available. Once you do that, it is set and you do not have to worry about changing it every time. And then when you open a new document as you begin to write your report or whatever it may be, all of those styles will be in the document.

>> I will leave it just like this because this works for me. From here I will add in my text, I will drop in some nonsense text that I've saved here. And then, from here what I'm going to do, is I will insert a page break. Just so that we keep our sections divided, it makes adding and page numbers after-the-fact easier, it will also help with the general structure of the document which in turn will help with creating bookmarks and having bookmarks transfer from the document structure directly into Adobe. So that when you need to convert this to a PDF, the bookmarks will be pulled from the document structure, which means we will not have to go in and add them manually so it will ultimately save time.

>> I will add in the page break, I will add in another heading and this will be heading one, but, I will divide this into multiple sections, I will add a subheading, this is where a lot of you have

asked me about an error in Adobe where it mentions headings and then it comes up with nesting problems or something like that. This is one aspect of that. That will help without. I have my main heading 1, I have two subsections in here, under this heading. Since this is heading 1, I will go to header 2, and put in my information. Whatever the title will be. And then I will add some text, -- add in some text, so now I have my nested heading, I have heading 1, and subheading 1. I had another question come in people asking about list and how to get Adobe to tag a list appropriately. You have to use the bullet tools for the listing tools in word to have it transfer into those header tags. That are in -- header tag the -- that is in Adobe.

>> I will put a bullet here and drop in the number of things. This will mean that when it converts over into Adobe it will be tagged as an actual list.

>> I will drop in a random text so that we can have a pseudo-documents. And then, I will come down here and this is my subsection 1. I will add in another subsection, I will head up to heading 2, and then we will head that in. I will add in more text, for appearances, and now what I would like to do is I will insert an image. So I go up to inserts, the picture, I have a couple of images that I will insert. Now that I have the image in there, it is pretty large, but I will leave it as it is. If you right-click on the image, there is an option to insert your caption, I will leave it as figure 1 and then I will put the words NOAA ship. I prefer to have for my figures the caption below the item. But it does not matter either way is fine.

>> When you click okay it automatically as an in there, if I right-click on the item again, if you go to format picture at the very bottom on the left-hand side, there is an option for alt text. You can put in your alternative text. Close it out, now that I put that alternative text it will convert when I convert the document to PDF. Since the alternative text has been done in word it should always convert over into PDF.

>> I will put that caveat in there, it should always. PDFs will sometimes do different things and be wonky and will not always convert over. And all of my testing and my experience it has worked thus far.

>> Now that I have inserted the image, I will put it in again a more random text. And now I will do another section. Since this is a whole new section and not a subsection I will go back to heading 1, because this is the same chapter level or main section level, this will be heading 2.

>> I put in my random text, and then I will add in a table. To insert my table, I go to insert table, I will draw a table. I will put in information. There will be random information in all of these tabs. So I have my table here, if you were to copy and paste in a table, which I will do that in a moment, all of those things from this point forward will apply to posted -- copy and paste the

table or ones that you have drawn. I will start my header row, this is an error it comes up frequently in PDF tables, if you highlight your header row, if you go up to table tools and layouts, there is an option for repeat header rows. If you click on this it resets this row as your header row. There is another way, you can right-click on the table, and go to table properties, if you go under table properties if you go to row, there are two options. Allow row to break across pages, and repeat as header row at the top of each page. The highlighted information will become the header row, and according to most 508 accessibility guidelines it says that it is a best practice to not allow a row to break across a page. What happens with that is there becomes issues with reading order and it does not follow the proper flow of the table. If you allow a row to break across pages. When you are setting up your table make sure to take that out of your table properties. I will click okay. And then I will right-click on the table again on the little table tool here. I will actually go back into table properties, and then alt text, this is where you can put in the description.

>> This is where I would recommend you put a table summary, table information something along that line. That I will click okay. -- and then I will click okay.

>> [Pause]

>> I would also like to add a caption for my table, I will go to references, I will click under captions, insert caption. This is caption 2, except it is not for a figure I go to label and change it to table, and then I will put in whatever I want to title the table. I have it set under my setting for putting the position of captions for tables above the item. That is where they will put this, so now I have my table, my table caption is above, my figure captions below just for consistency throughout the document. That I will put some text under the table. And then I will move on.

>> Will move on to inserting an equation. -- i will move on to inserting an equation. We will pretend this text is something about an equation, I will insert the equation now. If I go to insert, I choose an equation, I am not a mathematician, it will insert the equation for you. You can if you want to drop in your own copy and paste and drop the equation right into the box, you can create it, there is an option to insert a new equation. Where you can type your equation information in there, so now that I have my equation, what will happen in theory, when we convert this to a PDF is the equation be tagged as an equation. In Adobe.

>> So in addition to this equation I will go up here, just to make sure that everyone knows how to do this, I think everyone does, I will insert a footnote. Just right here, if you go under references, footnote says there is an option for footnote, there will bring up the options, it will put in the superscript for that and you can drop in whatever information you have there. And then -- there and then continue on with your document.

>> Just for due diligence we will add this in, I will also insert a citation, I've already added in the information in word, you can select from the list of information in your document or you can add a new source, if you add a new source it will bring this information you can select the type of document, fill out all of the information and then it is in their. -- there.

>> So I am going to go back to home, and start another heading, a new section. And then I will insert just for good measure one more image, so that we are all on the same page. So insert picture, I will put in a picture, if you right-click on it you can insert a caption. Since I just did a table it slipped it over to table, this is not a table it will be a gear. -- a figure.

>> If I right-click on here and format it sure, at the very bottom here is all text, -- alt text. From here, what I am going to do, I will go in, I have two images, I have a table, I would really like to insert at the beginning of my document, a list of figures, a list of tables, and a table of contents. I will go to insert, I will insert a blank page, which it inserted 18 above, -- one above, and then if I go to references, there is the option for the table, and -- of contents. If you inserted that way it will make sure the documents linked to all of those sections appropriately, it will provide a link to all of those sections, which should transfer when you convert it into Adobe. Additionally, sometimes bookmarks will pull from a table of contents as well, if we do this way we can make sure the books that make bookmarks in Adobe are accurate. I will do this basic automatic table. And now I have a table that shows, it pulled each of my headings including the subheadings. If you want to change the style you can go up here and change it, update table, if you click on update table it will automatically update either just the page numbers or the entire table, if I add something additional from this point forward I can always come back to the table of contents and it will automatically update. So I will do just that, I will inserts and the like -- another blank page, what I will do, I will insert a list of tables. Again, this is a new section I will go back to my main section heading to his heading 1, and do a list of tables.

>> If you go to references, there is the option to insert table of figures. If you click on this you get the style affects, down near the bottom under General, there are formats from template, which you can find here, you can change the format of everything. And the caption labels either figure, equation, table. Since I selected list of tables I will do table. And click okay. It automatically populates.

>> Then I will do the same thing again, I will insert a blank page, I will go to references, I will put in my heading and do my list of figures. Now I will go to references, and insert table of figures, and then under caps and label I will go figure. Now my two figures have shown up, the one I have a title in and the one I do not. And now I have two additional pages which are not reflected in my table of contents. If I come up to my table of contents and update entire table.

Not just the page numbers, it adds in those two items for me. If I scroll way down to the end of my document, I am going to insert a bibliography, under references if you go to the citation and bibliography section, insert a bibliography, which I should have done on a new page. This is my page break. And there is my bibliography. But again, my bibliography is not listed in my table of contents, -- table of contents, so I update table. Now that I have done all that, we are going to do a superquick check in word for accessibility.

>> Before I do that let me check the chat box really quickly. I do not see anything right now.

>> So, I will check accessibility in word, if you go to file, and I will say that currently in the library we have office 2010, we are slotted to get the new version, so some of these functions might be slightly different. With this newer version. As we get the newer version I will update all of this information, but for right now the library has 2010. If you go to file, enter information, there is the option for prepare for sharing, check for issues, and then check accessibility.

>> If you click on that, it will prompt you with the accessibility checker, as you can see here there are no accessibility issues found which is great. You also want to point out, when we are checking for Section 508 for the repository, we always check for property titles -- prop duties such as titles. If you go to advanced properties you can put in title here. This will transfer over, into Adobe, however I have run into the past few times I've done this, if you check the document properties, manually, the document title will be in the PDF. But when you run accessibility checker, it says that the title fails. When we are checking for accessibility we check both places. If it fails in the checker but when we check it manually under document properties and the title is there it is fine. We will not take it back to you for that. I am not sure why that is happening, that is something we are still working on. If you put it in under properties and word it will transfer over to the document properties. You can also put another affirmation -- other information. We only check for title and the language.

>> You can see that it actually changes that. So I will actually go back to my document, again you can see that the accessibility checker, there were no problems found. We're going to hope this works like we did earlier I'm going to save this document as a PDF, and I will save it. And then I will run an accessibility check on that. Here is the PDF, and I'm going to pause for a second, because I see there might be possible things. I see a couple of people have made comments to the entire audience, you can see them on my screen, Donna Collins mentioned that the properties look different in the new version, once we here in the library have access to those newer versions I will review this for you. In general of the principal and the process should be really similar to that. To what I've just gone through. Again, if there are questions and it looks like people are putting questions in the question box, I will get back to those since I cannot access them currently from here.

>> Now that I have converted this to a PDF, we will run the accessibility check, and we will hope and pray that it works out as it did earlier. When I run accessibility checks I check all things, even the things we do not focus on such as tables and headings and that sort of stuff. I run everything, I want to see what was going on with my document.

>> As you can see there is stuff wrong with my document. If you go to the very top, logical reading order which we expected, which we usually expect, color contrast again we expect those, and the knee will see that the title has failed. -- and then you will see that the title has failed. If I write click on the document, the title is in there. This is how we check for document properties. This is where we check for the title, even though I have this X here in title it is showing up in the properties. This is what we are focusing on.

>> This would all pass. AC under tables I have an issue, but notice that I do not have a problem with table headers or regularity, just summary. Again we do not require table summaries, it is a good practice to put them in but we do not require it. Other than that it looks like everything else is fine with the document and would be accepted for the repository. Except I will check my bookmarks now you can see that my bookmarks are here.

>> They were transferred over by the headings, in the table of contents. This document in its form, we will pretend it has a title page would be something that we would expect for the repository. What I will do, and what I have done in addition to this, I have created a Noah tech memo template. I have gotten some feedback from some people, I keep seeing some notices pop up, I will check over here.

>> Jacqueline, yes you are correct, some of these things if you have an older version older than 2010, some of the features are not available, a lot of the accessibility things have been integrated with the newer versions of Microsoft office. If you have the newer versions, 13 and 15, a lot of these functions are much easier to do. And require fewer steps. Again I will try to keep up with all of that as we get the newer versions.

>> So again, this is the tech memo template that I have created. This will be posted on the Section 508 subject guidance, people are free to take this and do whatever you would like with it. I will scroll through, and show you some of the highlights. On here I have included the information for the DOI, or where we in the library would typically put them when we are assigning DOI's. We have a main cover page, we have a title page here, a table of contents, again it is set up the same way as the other one, if you take this and edit when you update the table it will update it with the information that you have added. Again there is a list of tables, figures, abstracts, this one is a little more wordy, what I have done is in certain sections, around specific elements, if you come across any orange text, which I know is not necessarily 508 compliance, if

you come across any orange text, these are inspect -- these are instructions, they are text that explain what I did, best practices for how to handle specific elements such as how I inserted this figure, how I added the caption an alternative text for this image.

>> Here you can see that I added in a table here, more orange text which talks about tables, how to set the head arose and how to add alternate text for the table. This one covers multiple pages, and it explains in the orange text how to do that. I have multiple different heading levels, different styles of tables, the style of the table should not impact the functionality. And setting head arose, alt text should work the same regardless of the style of the table.

>> I've added in an ordered list, I have subheadings available, yet another image, a footnote, again more orange text, inserting equations, this equation has a footnote attached to it, another image, more tables, this is a little more detailed, I tried to provide a bunch of examples within this tech memo template. And then a basic works cited page. This does have word page numbering, the document I created did not, I figured most people knew how to add page numbering to the materials. This will be available if you have any comments, I welcome them.

>> I will check the chat box really quickly. I will probably have to get back to people since there are so many comments. If you have comments, please feel free to give them, pass them along, if you or your office have is a tech memo template or any template that you are using that is 508 compliance or you would like to make 508 compliance, I would be happy to take a look at it. If it is compliant and you are willing to share with other people, and would allow me to post it on our subject guide that would be fantastic. I think it is important that we share the resources that we have, amongst all of us. Since we are all in the same boat I am by no means an expert, these are things I have figured out on my own, this is how I've gotten things to work for how I have been able to make documents work and converts and have all of the accessibility elements in the PDF that we are requiring currently plus a few additional tables and headings and nesting and things of that nature. So I guess this did not take me a full hour to go it through everything, I know there are a ton of questions, I will record them, and get back to everyone.

>> Let me check one more time and see if there's something that I can quickly answer. The tech memo template, I will post it on the Section 508 guide under the brownbag seminars. It is not here yet but there will be another section for this particular brownbag, with the recording, and the transcript, and I will put the tech memo template there. I will also include as I mentioned earlier, they were kind enough to allow me access to their templates, I think it is a great template, it has similar elements to the one I showed, there are more specific to their needs, but I think it is a very good tool an example for people to use.

>> What else? I see that there are a bunch of comments of things other people have had success

with. What I think I will do, I will compile a bunch of these, and include them in the same section with all of this information. If other people have tips or tricks that they would like to share, please let me know, I'm happy to put those up, I'm happy to share them widely. I would like for these workshops and brown bags that we are doing for 508, to be a collaborative sort of thing. To share tricks and tips and things that we have all learned as we are working our way through this. So that we can learn from each other, to make sure that we are providing the access that we need to provide. With that, I am probably going to stop. I think I have gone over everything. Again I will let the recording go a little longer to get people time to put in any more questions, any more comments, I will stay on the line for a few minutes, and see if I can address some of the things in the chat box. So I might go silent for a moment, like I said by tomorrow, there will be a new section with today's information and the templates. As always, feel free to email me, or call the library there are a number of us here who can assist you. Hopefully everyone found this helpful. In preparing for it I learned a lot of things, hopefully I was able to help you with that as well. Thank you everybody. We will see you next time.

[Event Concluded]